

# ARIZONA TOURISM INDICATORS

A QUARTERLY NEWSLETTER OF RESEARCH AND STRATEGIC PLANNING

2ND QTR  
2008



## ARIZONA TOURISM INDICATORS

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## FROM ROOM SERVICE TO LIP SERVICE, TRIPADVISOR SURVEY REVEALS THE BEST AND WORST OF HOTELS

TripAdvisor(R), the world's largest travel community, today announced the results of its hotel survey of more than 2,200 travelers worldwide. Ninety-two percent of respondents said they are planning to stay at a hotel or B&B in the next 12 months. Nineteen percent will stay at a hotel or B&B more than 10 times in the coming year, and 45 percent will stay between 2-4 times in the next 12 months.

### The Good

When asked what makes a hotel great, 30 percent of respondents said location is the most important factor, while 29 percent cited comfortable beds, and 24 percent said hotel staff/great service. When asked what makes a hotel bed comfortable, 64 percent said it's the mattress, 11 percent noted the linens, and another 11 percent said it's the pillows.

### The Bad

When asked what ruins a hotel stay, 54 percent said unclean rooms, 14 percent cited noisy hotel guests and 11 percent pointed to poor hotel staff/service.

### The Ugly

Sixty-eight percent of travelers have experienced a dirty carpet at a hotel, 64 percent have dealt with non-working appliances, and 59 percent have waited as their room was not ready at check-in. Thirty-eight percent of travelers think the dirtiest part of a hotel is the carpet, 37 percent speculate it's the bedspread, 11 percent believe it's the television remote and another 11 percent think it's the bathroom.

### Bummed about Bedbugs

Eighty percent of travelers said they are concerned about bed bugs when visiting a hotel. Eight percent of travelers surveyed said they have experienced bed bugs at a hotel.

### A Picture is Worth a Thousand Words?

Seventy-eight percent of travelers said hotels are often "as advertised," 17 percent said they are rarely as advertised. Sixty-six percent of travelers said B&Bs are "as advertised," 20 percent said they are rarely so.

### Re-using Towels: Sign of the Times

When are hotel-goers more likely to reuse towels? When they know other guests are also doing it, says a new study.

The study, published in the Journal of Consumer Research, found that the types of signs posted in hotel bathrooms had different effects -- signs that focused on the environmental benefits were less effective than signs that pointed out the level of participation of other guests.

Study authors Noah J. Goldstein of the University of Chicago, Robert B. Cialdini and Vidas Griskevicius, both of Arizona State University, got a hotel chain to allow them to create a series of different towel re-use cards, which were placed in the hotel's bathrooms.

Some cards read "Help Save the Environment" and others read "Join Your Fellow Guests in Helping to Save the Environment."

In another study, the researchers were able to boost towel reuse even further by placing a sign in the room that said 75% of guests in that specific room reused their towels.

Source: *Travelmole*

## FROM ROOM SERVICE TO LIP SERVICE, TRIPADVISOR SURVEY REVEALS THE BEST AND WORST OF HOTELS (CONTINUED)

### Hotel Decision Making

Forty-two percent of travelers (46 percent of U.S. respondents) said they typically stay at luxury brand hotels, 31 percent usually stay at economy hotels and 21 percent said their norm is boutique hotels. Six percent most frequently stay at B&Bs.

Thirty-two percent of travelers (37 percent of U.S. respondents) said they are brand loyal when it comes to hotels. When asked what price range they target when searching for hotels, 19 percent said under \$300, 27 percent chose less than \$200, 28 percent said less than \$150, and 16 percent chose less than \$100 per night. Two percent

said they search for hotels at more than \$500 per night. When asked what type of hotel promotion offers the greatest incentive to book, 73 percent of travelers said it is a reduced room rate.

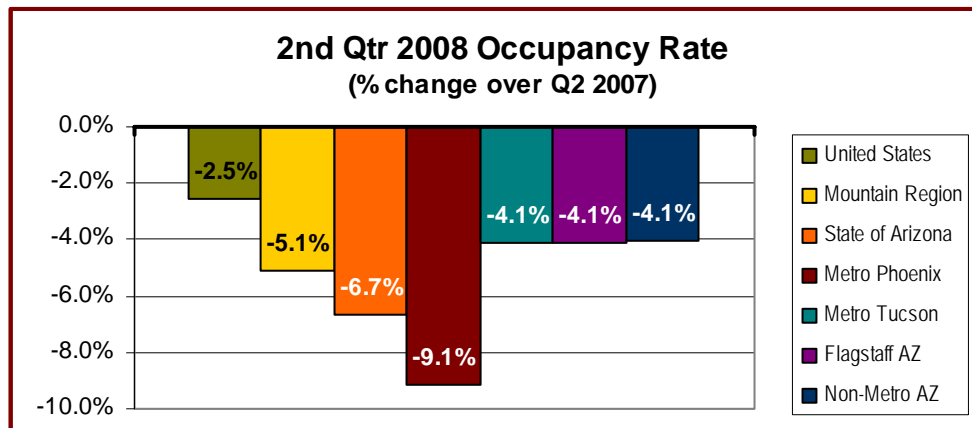
"Your hotel experience can make or break your vacation and we've found that travelers don't ask for much. Cleanliness is the top travel requirement among TripAdvisor members and that doesn't seem like too much to ask," said Michele Perry, vice president of global communications for TripAdvisor.

Source: [www.htrends.com](http://www.htrends.com)



Source: [www.flickr.com](http://www.flickr.com)

## LODGING PERFORMANCE



Source: Smith Travel Research

### NATIONAL

The lodging sector nationally saw a small decrease of -0.1% in demand as well as a 2.5% increase in supply while occupancy remained down (-2.5%) during the second quarter compared to the same quarter in 2007, according to Smith Travel Research. The increase in Average Daily Rate (ADR) was the driver of the increase in Revenue per Available Room (RevPAR) during the second quarter. ADR grew 3.8% to a

rate of \$107.29. RevPAR increased 1.2% to a rate of \$69.71 compared to Q2 2007.

### MOUNTAIN REGION

The Mountain Region, as defined by the US Census Bureau, witnessed a decrease in occupancy of -5.1%, down to 65.6%, in the second quarter over the same period in 2007. Occupancy was the primary driver to the decrease in RevPAR during the second quarter.

ADR grew 3.3% to a rate of \$99.56. RevPAR decreased -1.9% to a rate of \$65.30 compared to Q2 2007.

### ARIZONA

Arizona's lodging occupancy during the second quarter decreased, down -6.7% to a rate of 63.4%. Demand for lodging in the state also decreased, -3.8% during the quarter, equivalent to 235,307 fewer rooms. ADR increased 2.6% to a rate of \$104.44. The decrease in Occupancy drove RevPAR down -4.2% to \$66.25 for the state during the second quarter.

### METRO PHOENIX

Metro Phoenix's average occupancy rate during the second quarter was down -9.1% over last year with an average rate of 60.3%. Demand for lodging in the Metro Phoenix area decreased -6.1%, which is approximately 192,700 less rooms. The average ADR for Metro Phoenix during the second quarter was \$118.37, an increase of 2.8% over Q2 2007. The

## LODGING PERFORMANCE

(Continued from page 2)

decrease in occupancy drove the decrease in RevPAR, which was \$71.42, a decrease of -6.6% during the quarter.

### METRO TUCSON

Metro Tucson's average occupancy rate decreased -4.1% to a rate of 63.2% during the second quarter. Demand for Metro Tucson decreased -1.7%, equivalent to 15,408 less rooms. The average daily rate for Metro Tucson during the second quarter was \$97.67, an increase of 4.7% over Q2 2007. The decrease in occupancy, coupled with similar increase in ADR, resulted in a flattening of RevPAR, which was \$61.78, an increase of 0.3% during the quarter.

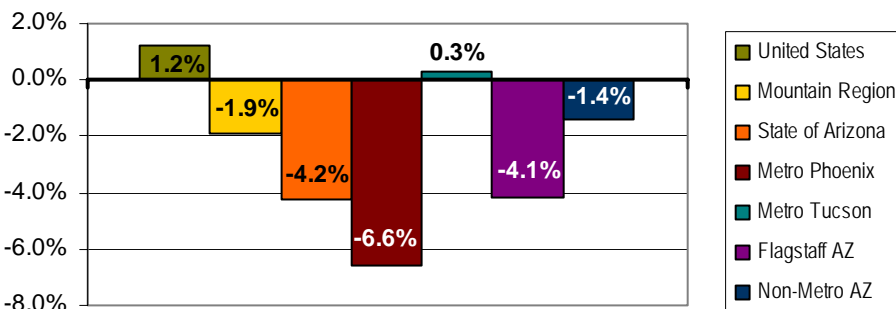
### FLAGSTAFF, AZ

Flagstaff's average occupancy rate decreased -4.1% to a rate of 70.9% during the second quarter. Demand for Flagstaff decreased -2.5%, equivalent to 8,437 less rooms. The average daily rate for Flagstaff during the second quarter was \$79.22, almost equal to Q2 2007. The decrease in occupancy and flattening of ADR drove the decrease in RevPAR, which was \$56.19, a decrease of -4.1% during the quarter.

### NON-METRO ARIZONA

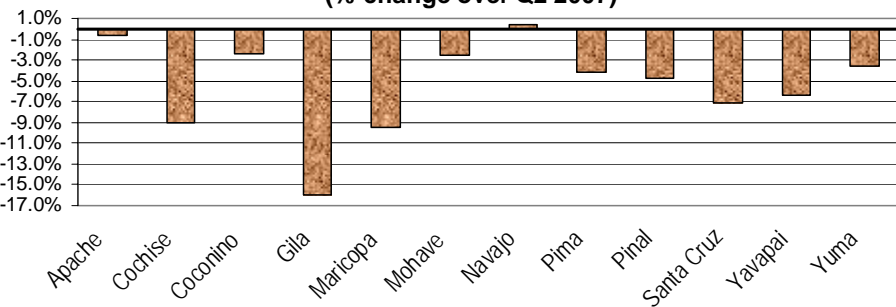
Non-Metro Arizona's lodging occupancy during the second quarter decreased, down -4.1% to a rate of 69.0%. Demand for lodging in Non-Metro Arizona decreased slightly, down -1.0% during the quarter, equivalent to 18,814 fewer rooms. ADR increased 2.8% to a rate of \$87.46. The decrease in occupancy drove RevPAR down slightly -1.4% to \$60.34 for Non-Metro Arizona during the second quarter.

2nd Qtr 2008 Revenue Per Available Room  
(% change over Q2 2007)



Source: Smith Travel Research

2nd Qtr County Occupancy Rate  
(% change over Q2 2007)



Source: Smith Travel Research

### COUNTY

Lodging indicators for Arizona's counties left much to be desired during the second quarter. Let's take a closer look at a few counties: Apache, Navajo, Mohave, and Yuma.

Apache County lodging was one of two counties that didn't drop significantly in occupancy while still increasing ADR. Lodging in Apache County witnessed a flattening in occupancy during the quarter, down -0.7% to a rate of 68.4%. This decrease was due to an slight decrease in rooms demanded at -0.5% which accounts for 494 less rooms. Flat occupancy and increases in ADR contributed to an increase in

RevPAR for the county. Apache County's average RevPAR rate during the second quarter was \$54.70, an increase of 7.1%.

Navajo County experienced growth in all lodging segments during the second quarter compared to Q2 2007, the only county to do so this quarter. Room demand was up 1.1% during the period, which accounts for an increase of 1,210 rooms. Increases in both occupancy and ADR contributed to an increase in RevPAR for the county. The average RevPAR rate was \$47.28, up 6.6% compared to the same period last year.

Mohave County was the only county in

(Continued on page 5)

## LODGING PERFORMANCE

### LODGING PERFORMANCE 2ND QUARTER 2008

Market	Occupancy		ADR (\$)		RevPAR (\$)		Demand		Supply	
	2008	% Change	2008	% Change	2008	% Change	2008	% Change	2008	% Change
United States	65.0%	-2.5%	107.29	3.8%	69.71	1.2%	270,769,629	-0.1%	416,729,284	2.5%
Mountain Region	65.6%	-5.1%	99.56	3.3%	65.30	-1.9%	32,402,950	-2.3%	49,405,761	3.0%
Arizona	63.4%	-6.7%	104.44	2.6%	66.25	-4.2%	5,929,714	-3.8%	9,348,589	3.1%
Metro Phoenix	60.3%	-9.1%	118.37	2.8%	71.42	-6.6%	2,980,442	-6.1%	4,939,427	3.4%
Metro Tucson	63.2%	-4.1%	97.67	4.7%	61.78	0.3%	894,940	-1.7%	1,414,963	2.6%
Flagstaff Arizona	70.9%	-4.1%	79.22	0.0%	56.19	-4.1%	323,154	-2.5%	455,587	1.6%
Non-Metro Arizona	69.0%	-4.1%	87.46	2.8%	60.34	-1.4%	1,939,398	-1.0%	2,811,392	3.2%

### COUNTY LODGING PERFORMANCE 2ND QUARTER 2008

County	Occupancy		ADR (\$)		RevPAR (\$)		Demand		Supply	
	2008	% Change	2008	% Change	2008	% Change	2008	% Change	2008	% Change
Apache	68.4%	-0.7%	80.01	7.8%	54.70	7.1%	61,719	-0.5%	90,272	0.0%
Cochise	68.3%	-9.0%	67.69	6.3%	46.21	-3.3%	176,224	-2.9%	258,130	6.7%
Coconino	75.4%	-2.4%	90.11	3.7%	67.98	1.2%	724,563	-1.7%	960,380	0.8%
Gila	65.0%	-15.9%	73.25	1.0%	47.64	-15.0%	67,122	-11.1%	103,194	5.7%
Graham	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%
Greenlee	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%
La Paz	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%
Maricopa	60.3%	-9.4%	119.60	2.1%	72.18	-7.5%	2,897,602	-6.4%	4,801,350	3.4%
Mohave	59.8%	-2.6%	74.86	-1.7%	44.76	-4.3%	229,983	-3.1%	384,657	-0.5%
Navajo	69.1%	0.4%	68.47	6.3%	47.28	6.6%	204,861	1.1%	296,666	0.8%
Pima	63.2%	-4.1%	97.67	4.5%	61.78	0.2%	894,940	-1.7%	1,414,963	2.5%
Pinal	60.0%	-4.8%	75.31	5.1%	45.18	0.1%	82,840	-1.0%	138,077	4.1%
Santa Cruz	67.1%	-7.1%	73.23	1.0%	49.12	-6.2%	58,532	-7.0%	87,269	0.0%
Yavapai	71.7%	-6.3%	131.46	1.6%	94.21	-4.9%	301,035	-4.4%	420,056	2.1%
Yuma	57.8%	-3.6%	74.82	0.5%	43.24	-3.1%	172,166	14.3%	297,934	18.6%

Source: Smith Travel Research

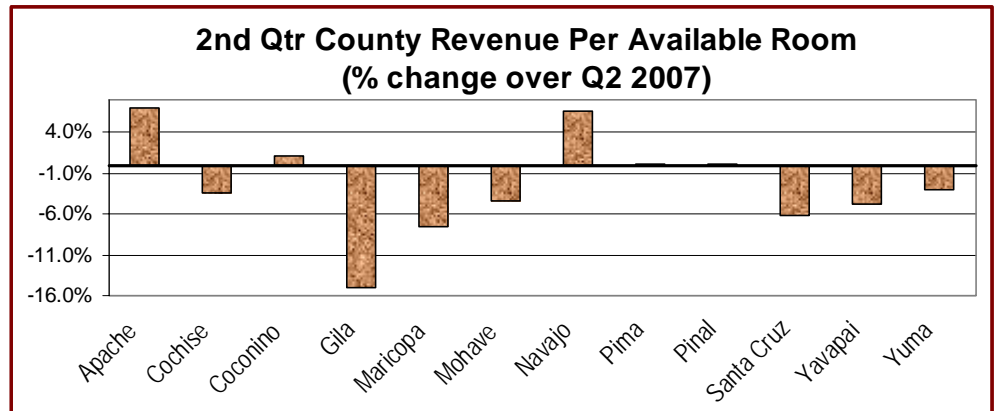


## LODGING PERFORMANCE(CONTINUED)

Continued from page 3

Arizona to perform negatively in all lodging segments this quarter. In Mohave County, occupancy decreased -2.6%, to a rate of 59.8% during the second quarter. Decreased room demand, down -3.1%, or 7,483 rooms, and flat room supply contributed to the decreased hotel occupancy rate. Mohave County's ADR for the quarter was \$74.86, down -1.7%. The decreases in occupancy and ADR contributed to the decrease in the average RevPAR rate for the quarter, which was \$44.76, down -4.3% compared to Q2 2007.

Yuma County has witnessed much volatility in its room supply and demand. Yuma County's occupancy rate decreased -3.6% to a rate of 57.8% during the second quarter. This



was due to an 18.6% increase in room supply in Yuma County, approximately 46,683 more rooms. The decrease in occupancy contributed to the decrease in RevPAR for the county. The average RevPAR rate was \$43.24, down -3.1% compared to Q2 2007. ADR was up 0.5% to \$74.82 for the quarter.

In addition, Navajo county continued to

see positive increases in occupancy for the sixth consecutive quarter. Counties that witnessed a decline in RevPAR for the quarter included Cochise, Gila, Maricopa, Mohave, Santa Cruz, Yavapai, and Yuma counties.

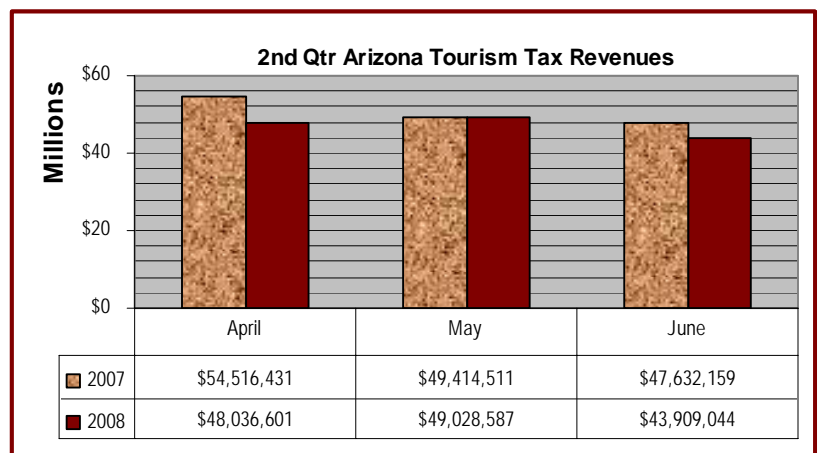
Source: Smith Travel Research

## AZ TOURISM RELATED TAX

During the 2<sup>nd</sup> quarter of 2008, travelers generated tax revenue in the tourism sectors of lodging, restaurant/bar, retail, and amusements totaling approximately \$140.9 million, a -7.0% decrease over the same period last year. Visitor generated revenues were down in all sectors. During the 2<sup>nd</sup> quarter of 2008, the lodging sector decreased -5.9% to just over \$30 million dollars, the restaurant/bar sector decreased 1.5%, the retail sector was down -9.6%, while the amusement sector was down -2.2% compared to the same period last year. During the 2<sup>nd</sup> quarter of 2008, the most travel related tax revenues were generated in the month of May, down -0.8%. Also in May, lodging and restaurant/bar witnessed increased tourism taxes, but those were offset by declines in the retail and amusement sectors

### AZ TOURISM RELATED TAX REVENUES- 2ND QTR

Tourism Sectors	2007	2008	% Change
Lodging	\$32,755,926	\$30,826,029	-5.9%
Restaurant/Bar	\$32,637,250	\$32,147,593	-1.5%
Retail	\$85,047,824	\$76,903,630	-9.6%
Amusement	\$1,122,101	\$1,096,980	-2.2%
<b>Quarterly Total</b>	<b>\$151,563,101</b>	<b>\$140,974,232</b>	<b>-7.0%</b>



*Tourism sectors as defined by the Tourism Economic Impact Model (TEIM) developed by the Travel Industry Association of America, and adapted for Arizona by Northern Arizona University, include: lodging, restaurant/bar, retail, and amusements. TEIM model produced the following percentages, which are used to figure gross sales attributable to tourism: lodging (95%), restaurant/bar (23.62%), retail (10.91%), and amusements (6.43%). Source: Arizona Department of Revenue, NAU*

## AZ STATE PARK VISITATION

Top Visited State Parks in Q2 were:

1. Slide Rock SP	89,248
2. Lake Havasu SP	82,482
3. Patagonia SP	61,390
4. Fool Hollow Lake SP	41,117
5. Dead Horse Ranch SP	40,743

Visitation to Arizona's State Parks decreased -3.0% during the second quarter to 665,197 visitors. Declines in April and June, down -6.3% and -3.6% respectively, contributed to the quarterly decrease compared to the same period last year. The most improved park in the state park system was Oracle State Park with 29.8% increase in visitation.

**NORTHERN** In northern Arizona, Dead Horse Ranch had the highest increase in the region, up 7.5%, in the second quarter and was also the second most visited park in the region. Another well visited park, Slide Rock, experienced a decline in visitation with a -7.9% decrease to 89,248 visitors for the quarter. The region's visitation decreased -2.6% compared to Q2 2007.

**EASTERN** Overall, the eastern region of the state had an increase of 11.1% in visitation. Fool Hollow Lake, the most visited park in the region, experienced a 16.4% increase up to 41,117 visitors for the quarter. In contrast, Tonto Natural Bridge visitation decreased -5.0% to 25,564 in the second quarter.

**SOUTHERN** Decreased visitation to Patagonia Lake and Kartchner Caverns, down -8.7% and -4.6% respectively, contributed to the decrease of -4.0% for the southern region. Increased visitation at Roper Lake (4.3%), Tombstone Courthouse (1.1%), and Tubac Presidio (1.3%) offset some of the declines in the most visited parks of this region.

**WESTERN** Overall, the western region of the state had a decrease of -12.5% in visitation. Lake Havasu, the most visited park in the region,

## AZ STATE PARKS MONTHLY VISITATION—2ND QUARTER

	2007	2008	% Change
April	251,569	235,597	-6.3%
May	224,231	227,252	1.3%
June	209,870	202,348	-3.6%
<b>Quarterly Total</b>	<b>685,670</b>	<b>665,197</b>	<b>-3.0%</b>

## ARIZONA STATE PARKS VISITATION—2ND QUARTER

Park	2007	2008	% Change
W Alamo Lake SP	19,907	19,935	0.1%
E Boyce Thompson Arboretum SP	16,659	17,893	7.4%
W Buckskin Mountain SP	26,669	25,515	-4.3%
E Catalina SP	28,431	35,647	25.4%
W Cattail Cove SP	30,716	27,874	-9.3%
N Dead Horse Ranch SP	37,888	40,743	7.5%
E Fool Hollow Lake RA	35,314	41,117	16.4%
N Fort Verde SHP	5,515	5,429	-1.6%
N Homolovi Ruins SP	5,981	5,013	-16.2%
N Jerome SHP	17,079	17,592	3.0%
S Kartchner Caverns SP	38,631	36,839	-4.6%
W Lake Havasu SP	104,070	82,482	-20.7%
E Lost Dutchman SP	13,701	15,566	13.6%
E Lyman Lake SP	12,293	12,302	0.1%
E McFarland SHP	958	674	-29.6%
E Oracle SP	2,446	3,174	29.8%
S Patagonia Lake SP	67,216	61,390	-8.7%
S Picacho Peak SP	11,095	11,019	-0.7%
N Red Rock SP	24,615	24,845	0.9%
N Riordan Mansion SHP	7,099	7,198	1.4%
S Roper Lake SP	27,173	28,337	4.3%
N Slide Rock SP	96,934	89,248	-7.9%
S Tombstone Courthouse SHP	12,801	12,944	1.1%
E Tonto Natural Bridge SP	26,900	25,564	-5.0%
S Tubac Presidio SHP	2,395	2,425	1.3%
W Yuma Quartermaster Depot SHP	2,171	2,354	8.4%
W Yuma Territorial Prison SHP	11,013	12,078	9.7%
<b>Total</b>	<b>685,670</b>	<b>665,197</b>	<b>-3.0%</b>

Source: Arizona State Parks

SP: State Park SHP: State Historic Park RA: Recreation Area SNA: State

\*Regions as defined by Arizona State Parks

Northern Region (N); Eastern Region (E); Southern Region (S); Western Region (W)

experienced the largest decline in the region, down -20.7%, to 82,482 visitors. Some of the decline can be attributed to a change in visitor counting methodology. In contrast, Yuma Territorial Prison visitation increased 9.7% to 12,078 visitors in the second quarter. The three most visited parks in the region all witnessed declines in the 2nd quarter.

## AZ NATIONAL PARK VISITATION

### Top Visited National Parks in Q2 were:

1. Grand Canyon NP	1,361,484
2. Glen Canyon NRA	558,243
3. Lake Mead NRA	443,546
4. Canyon de Chelly NM	239,877
5. Montezuma Castle NM	195,972

### ALL ARIZONA NATIONAL PARKS VISITATION

#### 2ND QUARTER 2008

	2007	2008	% Change
April	1,118,255	988,763	-11.6%
May	1,181,279	1,200,073	1.6%
June	1,378,963	1,377,694	-0.1%
Quarter Total	3,678,497	3,566,530	-3.0%

### ARIZONA NATIONAL PARKS VISITATION—2ND QUARTER

Park	2007	2008	% Change
Canyon de Chelly NM	242,891	239,877	-1.2%
Casa Grande NM	15,576	13,791	-11.5%
Chiricahua NM	14,425	14,646	1.5%
Coronado NM	21,060	20,034	-4.9%
Fort Bowie NHS	2,476	2,433	-1.7%
Glen Canyon NRA	551,802	558,243	1.2%
Grand Canyon NP	1,390,753	1,361,484	-2.1%
Hubbell Trading Post NHS	28,126	16,362	-41.8%
Lake Mead NRA	526,486	443,546	-15.8%
Montezuma Castle NM	178,885	195,972	9.6%
Navajo NM	22,843	24,159	5.8%
Organ Pipe Cactus NM	81,926	114,067	39.2%
Petrified Forest NP	175,316	162,028	-7.6%
Pipe Spring NM	16,300	15,882	-2.6%
Saguaro NP	150,764	146,614	-2.8%
Sunset Crater Volcano NM	79,793	67,736	-15.1%
Tonto NM	13,363	16,685	24.9%
Tumacacori NHP	9,695	7,343	-24.3%
Tuzigoot NM	32,086	29,823	-7.1%
Walnut Canyon NM	42,912	38,588	-10.1%
Wupatki NM	81,019	77,217	-4.7%
<b>Total</b>	<b>3,678,497</b>	<b>3,566,530</b>	<b>-3.0%</b>

Source: National Park Service

NP: National Park      NM: National Monument      NHS: National Historic Site  
NRA: National Recreation Area      NHP: National Historic Park

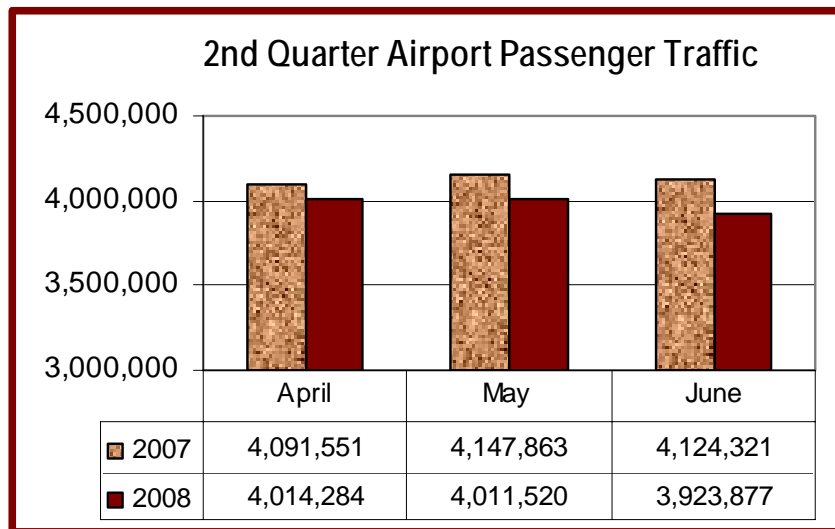
There was a decrease in recreational visitation to Arizona's National Parks during the 2nd quarter of 2008. Approximately 3.6 million people visited Arizona's National Parks, which is down -3.0% compared to the same period last year. May proved to be the best performing month with an increase of a 1.6%.

Of the 21 Arizona National Parks, 71% saw a decrease in visitation. The top performer was Organ Pipe Cactus NM, up 39.2% to 114,067 visitors during the 2nd quarter, a pattern continued since last quarter. Some of this increase is due to increased traffic at the Lukeville port of entry. This was followed by Tonto NM, which welcomed 16,685 visitors, up 24.9%. Montezuma Castle NM, Navajo NM, Chiricahua NM, and Glen Canyon NRA all boasted increases over the same period last year, up 9.6%, 5.8%, 1.5% and 1.2% respectively.

In contrast, Hubbell Trading Post NHS experienced the largest decline in visitation, down -41.8% to 16,362 visitors during the second quarter. Visitation to Tumacacori decreased -24.3% to 7,343 visitors for the second quarter. Lake Mead NRA visitation declined -15.8% to 443,546. Sunset Crater Volcano NM experienced a decline of -15.1% down to 67,736 visitors for the quarter.

Grand Canyon National Park visitation decreased -2.1% to 1,361,484 for the quarter, equivalent to 29,269 fewer visitors than the same period last year.

## ARIZONA AIRPORT PASSENGER TRAFFIC



Airport passenger traffic from the ten tracked Arizona airports was down -3.3% during the second quarter, a decrease of 414,054 passengers, ending a positive trend in passenger traffic that had continued since the first quarter of 2007. The highest volume of airport passenger traffic was recorded in the month of April, with approximately 4 million passengers, a decrease of -1.9% over the same month last year. May witnessed a decline of -3.3% in passenger traffic while June decreased -4.9%.

Phoenix Sky Harbor International posted a decrease, down -4.4% over the same period last year. In contrast, international passenger traffic increased 8.0% at Phoenix Sky Harbor International and 86.0% at Tucson International airports. Tucson International Airports increase can be attributed to higher capacity levels on some flights.

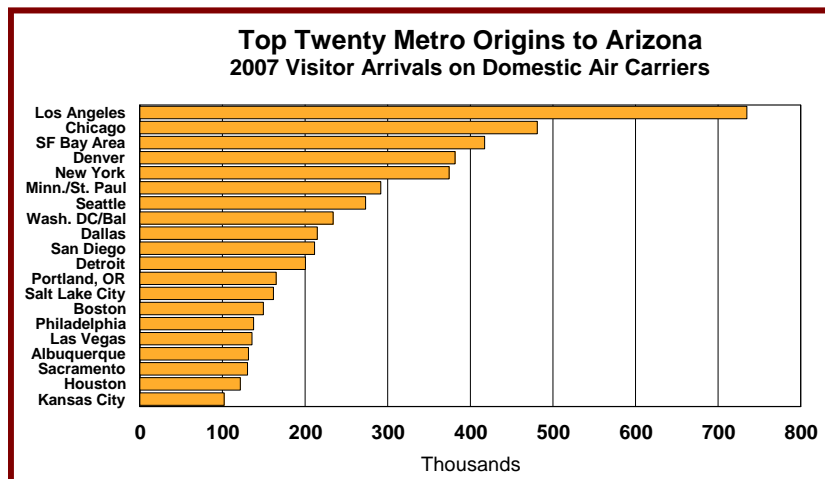
Page Municipal airport witnessed robust growth with an increase of 23.0% or 4,250 more passengers. Similarly, Yuma International Airport traffic grew 23.4% in the second quarter, equivalent to 7,843 passengers.

In October 2007, Phoenix-Mesa Gateway began offering regular scheduled service, resulting in an increase of 2874.9% in the second quarter over the same period last year.

Airports	2007	2008	% Change
Flagstaff Pulliam	25,950	24,970	-3.8%
Grand Canyon National Park	222,992	208,950	-6.3%
Kingman	1,215	1,207	-0.7%
Page Municipal	18,510	22,760	23.0%
Phoenix-Mesa Gateway	3,138	93,351	2874.9%
Phoenix Sky Harbor International	10,915,691	10,431,103	-4.4%
Prescott Municipal	1,797	1,990	10.7%
Show Low Regional	3,411	2,829	-17.1%
Tucson International	1,137,528	1,121,176	-1.4%
Yuma International	33,503	41,345	23.4%
<b>2nd Quarter Total</b>	<b>12,363,735</b>	<b>11,949,681</b>	<b>-3.3%</b>

Source: Activity reports provided by airports

According to Dean Runyan Associates, the top twenty metropolitan origins comprise about two-thirds of all out-of-state visitor travel on domestic flights to Arizona. The chart to the right ranks these metropolitan origins in terms of volume of travel to Arizona in 2007. Los Angeles far surpasses all other markets followed by Chicago, San Francisco, Denver, and New York.

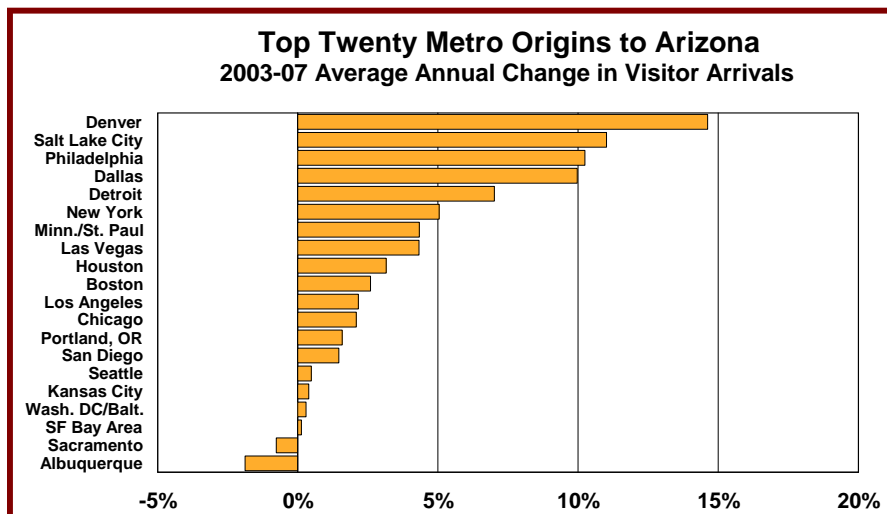


Source: Dean Runyan Associates



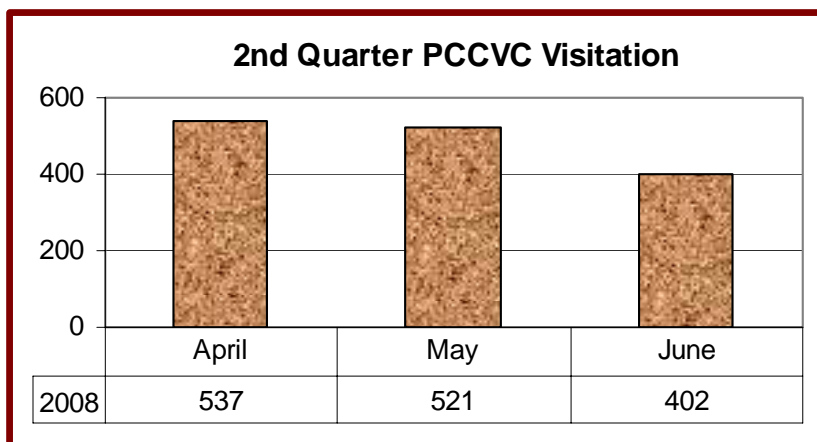
## ARIZONA AIRPORT PASSENGER TRAFFIC (CONTINUED)

According to Dean Runyan Associates, the top twenty metropolitan origin markets to Arizona are ranked in terms of their average annual percentage change in visitor volume (from 2003 to 2007). Denver, one of our top five origin markets by volume, is also Arizona's fastest growing origin market. Salt Lake City, Philadelphia, Dallas, and Detroit are also witnessing robust growth. Sacramento and Albuquerque have both declined in visitor arrivals by air.



Source: Dean Runyan Associates

## PHOENIX CONVENTION CENTER VISITOR CENTER



Source: Phoenix Convention Center Visitor Center



Phoenix Convention Center Visitor Center is located at 125 N. Second Street, Suite 120 Phoenix, AZ 85004.

Top 10 Originating States 2nd Quarter 2008		
1	Arizona	210
2	California	51
3	Texas	36
4	Washington	36
5	Illinois	32
6	New York	31
7	Ohio	29
8	Florida	24
9	Michigan	22
10	Pennsylvania	22

The Phoenix Convention Center Visitor Center opened in January 2008, replacing the Grand Canyon State Visitor Center located at the Arizona Office of Tourism. During the second quarter of 2008, there were a total of 1,460 visitors to the Phoenix Convention Center Visitor Center. The top five originating states were Arizona, California, Texas, Washington and Illinois and they account for 25.0% of all visitation to the center. Visitors originating from a foreign country totaled 297, 20.3% of all visitation. Visitors to the center from Canada equaled 53 while the visitor center welcomed 39 travelers from the United Kingdom.

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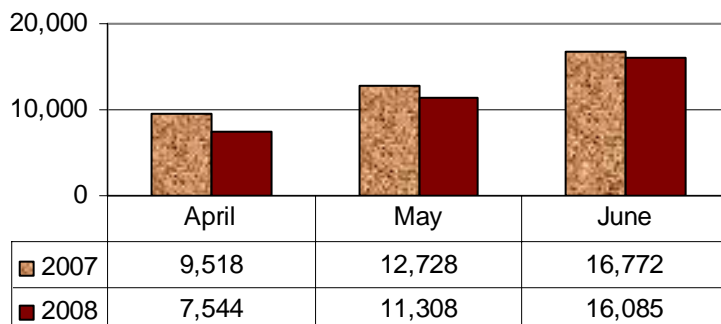
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### PAINTED CLIFFS WELCOME CENTER



Painted Cliffs Welcome Center is located on Interstate 40, Exit #359-Grants Road in Lupton, Arizona

#### 2nd Quarter Painted Cliffs Visitation



During the second quarter of 2008, there were a total of 34,937 visitors to the Painted Cliffs Welcome Center, a decrease of -10.5%, or 4,081 visitors, compared to the same period last year. This drop in visitation can be attributed to the decrease in visitors originating from the United States, which was down -11.3%, or 4,121 visitors, compared to the same period last year. The top five originating states were Colorado, Texas, Minnesota, New Mexico, and Michigan. In the second quarter, visitation from all of the top 10 originating states decreased when compared to Q1 2007. Together, the top 10 originating states had a decline of -31.3%, or 7,491 visitors.

Visitors originating from a foreign country increased, up 6.5% to a total of 2,109 visitors. Visitors to the welcome center from Canada decreased -35.5% to 717 visitors during the 2<sup>nd</sup> quarter compared to the same period last year. There were dramatic increases in visitation for those originating from several key markets such as Germany (up 336.3% to 349), France (up 412.5% to 82), and the United Kingdom (up 189.3% to 162).

#### Top 10 Originating States 2nd Quarter 2008

1	Colorado	-5.4%
2	Texas	-10.0%
3	Minnesota	-20.8%
4	New Mexico	-15.0%
5	Michigan	-12.8%
6	Illinois	-23.5%
7	California	-14.1%
8	Iowa	-4.3%
9	Wisconsin	-27.4%
10	Oklahoma	-5.6%

Quarterly visitation totals by state and by country of origin can be found at [www.azot.gov](http://www.azot.gov).

Source: Painted Cliffs Welcome Center